Member of Tri-County EITC Coalition
(Berrien, Cass, and Van Buren Counties)

Tax Preparation January-April 2010

Benton Harbor:

Tax returns completed	262
Total federal refunds	$287,455
Total federal earned income credit	$111,956
Number of tax returns with EITC	76
% of Returns with EITC	29.0%
Total state earned income credit	$22,391
Average state EITC per recipient	$295
Average Adjusted Gross Income of taxpayers served	$12,628
State EITC as % of Income	2.3%

Niles:

Tax returns completed	241
Total federal refunds	$272,280
Total federal earned income credit	$73,823
Number of tax returns with EITC	65
% of Returns with EITC	27.0%
Total state earned income credit	$14,765
Average state EITC per recipient	$227
Average Adjusted Gross Income of taxpayers served	$13,141
State EITC as % of Income	1.7%

Presenter:

Started my career in accounting in 1980 with Touche Ross & Co. CPAs
(now Deloitte & Touche, largest CPA firm in the world)

Clients at the time included: Grand Valley State, Country Fresh Dairies,
Williams & Works Engineers, City of Kalamazoo, etc.

Awarded Michigan CPA certificate in 1983

Member Michigan Association of CPAs

Current Position: Chief Financial Officer Lakeshore Public Schools
since 1993

Past President of the Michigan School Business Officials (MSBO)

2011 Recipient of the MSBO Distinguished Service Award

Board Member of the Benton Harbor Soup Kitchen & of
St. Augustine of Canterbury Church of Benton Harbor

Volunteer with the Berrien County EITC Coalition for five years
Three of those years as county volunteer coordinator

About Lakeshore Public Schools:

Total enrollment of just under 3,000 students

Lakeshore ranks 752nd out of 774 districts and charters in the State
in terms of per student spending on business and adminisrative costs

Michigan school districts need assistance in purchasing of technology
to ensure Michigan's students are competitive in 21st Century

Recommends: Allowing Building & Site Sinking Fund
for purchase of educational technology (same as bonded debt)